

KFI Request Form

Please complete all the fields on this form and email it to kfirequests@natwest.com. All fields are mandatory.

Intermediary Information

Business Name

Intermediary Name

Address

Postcode

Telephone

Fax

Email (where response is to be sent)

FCA No.

Client Information

Please ensure you have obtained your client's consent to allow you access to their existing mortgage information held by the bank. We will populate the KFI with the balance outstanding. Note that the values in this KFI may alter between now and completion.

Main applicant

Mr Mrs Miss Ms

Client's Full Name(s)

Date of birth

Marital Status

Married
 Single
 Separated
 Divorced
 Widowed
 Living with Partner

Sex

Male
 Female

Current Full Address

Postcode

Existing NatWest Mortgage Account No.

Other Information (i.e.2nd Account number if client has 2 mortgages to port.)

Joint applicant

Mr Mrs Miss Ms

Client's Full Name(s)

Date of birth

Marital Status

Married
 Single
 Separated
 Divorced
 Widowed
 Living with Partner

Sex

Male
 Female

Current Full Address

Postcode

Existing NatWest Mortgage Account No.

Other Information (i.e.2nd Account number if client has 2 mortgages to port.)

Client's Loan Requirements All this data is required in order to produce a KFI from our system

Advance Type

Purchase Remortgage Buy to Let

Purchase Price/Valuation (approximate if not known)

£

Loan to Value

Repayment Strategy

Interest Only £

Capital & Interest £

Total £

Does your client wish to add the following fees to the advance?

Product Fee £

Higher lending charge £

Tick this box if the property to be mortgaged is in Scotland or Northern Ireland

Scotland

Mortgage Required (including ported element if applicable)

£

Term

Years Months

New Product (include rate, discount and end date. Certain products may carry restrictions, so please check that all qualifying criteria are met)

KFI Information (Please complete all fields)

Name of Firm/Principal

(under whose FCA number you will submit the full application)

Name of Mortgage Club/Network

(if different from above)

Business Development Manager (if known)

Scheme Code

(if known)

Which Level of Service are you providing your client with?

Residential applications

Advised Rejected Advice Execution only

Are you charging a fee for arranging this mortgage?

Yes No £

Buy to Let

Unregulated

Any further information:

Next Steps

Please ensure you have completed all fields as this is the minimum amount of information we will require to produce a compliant ported product KFI from our system.

Email the form to us at kfirequests@natwest.com.

ONLY FOR USE BY MORTGAGE INTERMEDIARIES